WELCOME TO **PATIENT PROTECT**

An Introductory Setup Guide

14-Day	425+	100%
Free guided trial	Compliance actions	HIPAA mapped coverage

FOR	HEALTH PROFESSIONALS	TYPE	SETUP GUIDE
		DATE	2/20/26

WELCOME!

Welcome to Patient Protect, a comprehensive and robust platform intended to help your office optimize front-desk tasks, while streamlining patient care using the most advanced HIPAA workflows in the industry. HIPAA compliance isn't just an obligation—It's a patient right!

This guide will walk new users through the basics of Patient Protect, and the underlying technology that makes it the new standard for patient data protection.

What this document will cover:

01 Create Your Account — Account setup and free trial activation

02 Welcome to the Platform — Your onboarding video and first impressions

03 Your Dashboard — Four areas — one command center

04 How Compliance Works — Why small daily actions beat one-time effort

05 Compliance Advice — Your daily task engine

06 Explore the Platform — Threat intelligence, news feed, and training

07 Secure Messaging — End-to-end encrypted communication for ePHI

08 The Compliance System — Policies, SRA, audits, risk analytics, and more

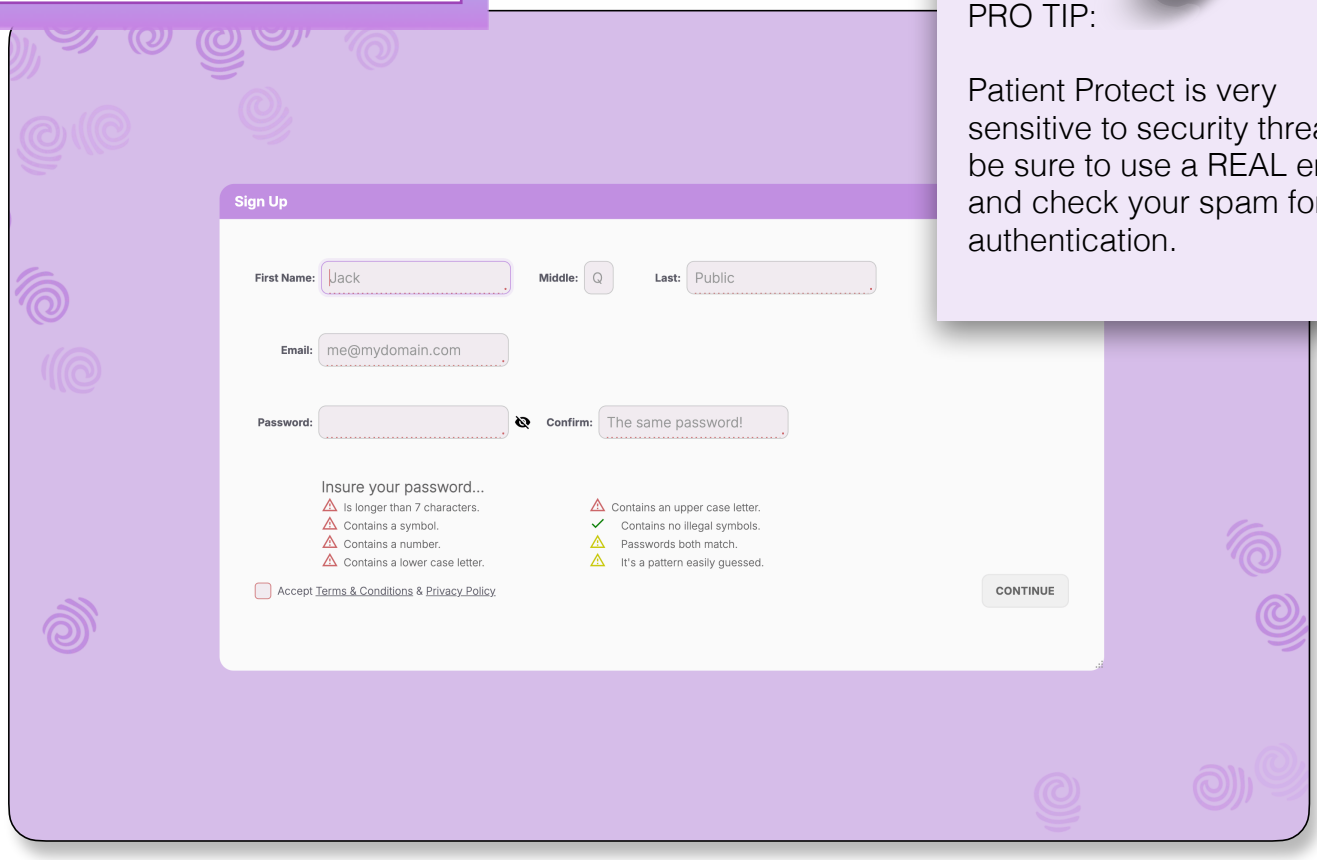
09 Administration — Settings, subscriptions, and configuration

10 Pro Features — Advanced tools that scale with your practice

STEP 1 — SETUP NEW ACCOUNT

Creating a new account is simple. All this requires if for a new user to click on the welcome link (on the Patient Protect website), and follow the required account information to get started! Getting started takes less than five minutes. No complicated configurations, no decisions to make yet — just the basics to get you in the door.

Patient-Protect.com/SignUp



PRO TIP:

Patient Protect is very sensitive to security threats, be sure to use a REAL email, and check your spam for authentication.

WHY WE COLLECT PAYMENT UPFRONT

Your 14-day trial is fully unlocked from day one — no feature gates, no restricted mode. We collect payment details to verify identity and ensure you don't lose access mid-onboarding if you choose to continue. You won't be charged until you decide to or until expiration of the promotion period.

Your First Hour with Patient Protect

Most practices spend months trying to “get HIPAA compliant”—and still operate with gaps.
Patient Protect changes your position immediately.

Minute 0 — Coverage Begins Instantly

The moment you sign up, core protections are already in place:

- Encryption (data in transit and at rest)
- Access controls
- Audit logging
- Secure authentication and session protection
- Brute force prevention

~25 HIPAA requirements are satisfied instantly—before any user action

30-60 Minutes— From Setup to Security

In under 60 minutes, you move through a guided flow that:

- Configures your organization
- Assigns security and privacy responsibility
- Executes your Business Associate Agreement (BAA)
- Completes core compliance acknowledgments
- Activates multi-factor authentication (MFA)
- Establishes password and recovery safeguards
- Introduces training and system workflows

~70–75% of HIPAA requirements addressed (~50+ of ~75 within the first 30 minutes alone)

Understanding Your Compliance Score

Your compliance score will show ~20–30%—by design.
The highest-weight requirements (risk assessments, policies, audits) take structured work over time.

Within your first hour, your practice has:

- Activated enterprise-grade security controls
- Covered the majority of HIPAA requirements
- Eliminated the most common exposure points
- Moved from uncertainty to structured compliance

Patient Protect enables your practice to satisfy ~70% of HIPAA’s distinct regulatory requirements within the first hour—before a single policy is written.

STEP 2 — GETTING STARTED

After signup, a short onboarding video plays before you reach your dashboard. Watch it. It reframes what compliance means before you take your first action. The walkthrough covers three things — and each one matters:

How Patient Protect Works

Why the system is built around daily actions instead of one-time setups — and why that distinction changes everything.

What Your Dashboard Represents

A live compliance posture — not a static checklist. Your scores reflect real operational behavior, updated continuously.

How Progress Happens

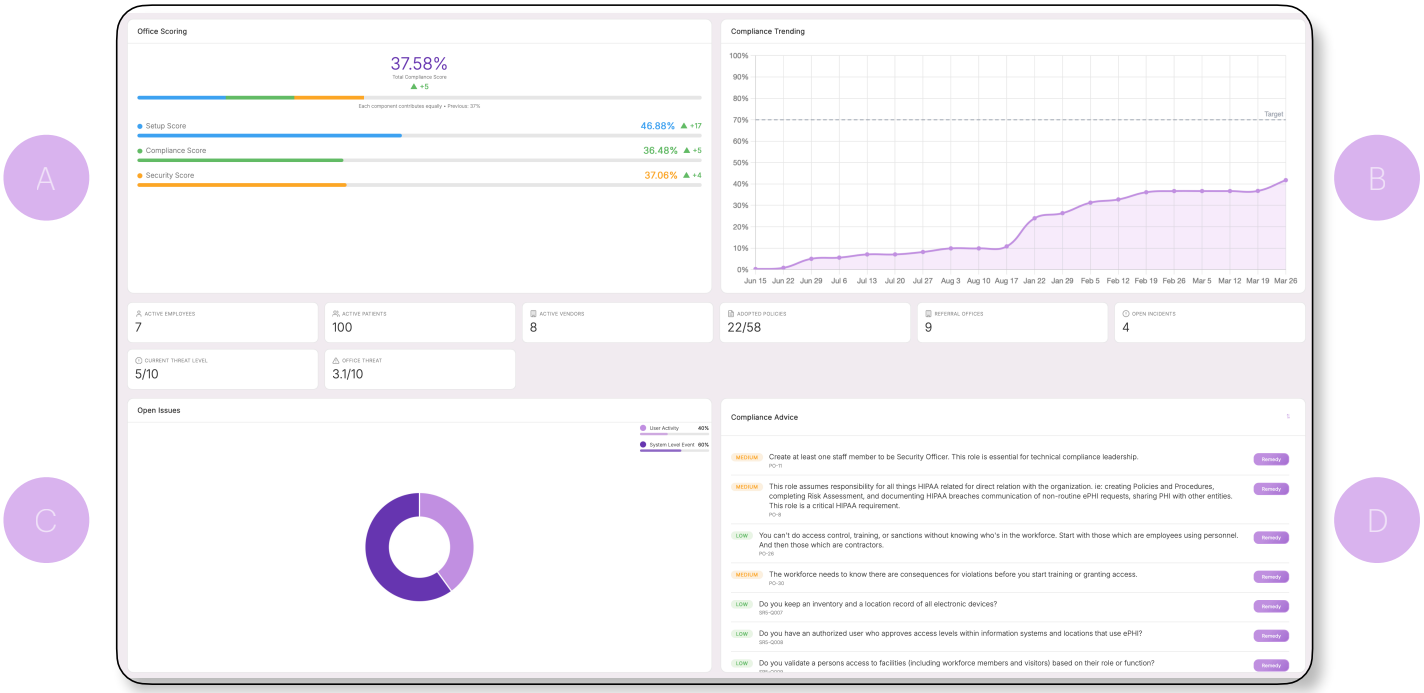
Compliance improves through consistent engagement. The video sets the right expectation: this is a system you use, not a form you fill out.

What Comes Next

The video ends at your dashboard. From that point forward, the platform tells you what to do. You don't need to figure out where to start.

STEP 3— YOUR DASHBOARD

Every time you log in, this is where you start. Your dashboard gives you a complete, real-time picture of your compliance posture — organized into four areas that each tell a different part of the story.



A Office Score

Three scores — Setup, Compliance, and Security — calculated from your real platform activity. You start above zero on day one. Compliance isn't binary: it accumulates.

B Compliance Trend

A live trend line that shows how your posture evolves over time. Log in consistently, complete tasks, and the line moves in one direction. It's your practice's compliance signature.

C Open Issues

Reported incidents, active risks, and unresolved items — all surfaced in one place. Nothing gets buried, nothing gets missed.

D Compliance Advice

The engine of the platform. Daily prioritized tasks, guided setup actions, and ongoing compliance steps — always current, always specific to where you are right now.

STEP 4— THE SYSTEM

How Compliance Actually Happens

Most compliance tools are built around a single painful event: a long questionnaire, a one-time audit, a box to check. Patient Protect is built around a different premise entirely.

Small, guided daily actions → compliance builds naturally over time.

Traditional Compliance Tools	Patient Protect
150+ questions, completed in one sitting	✓ Small tasks surfaced one at a time, every day
No context for what each question means	✓ Every task is explained and tied to a HIPAA requirement
Progress stalls because the effort is too high	✓ Consistency is easy because the effort is low
Compliance looks like a finished document	✓ Compliance looks like an active, improving record

What's Behind Every Task

There are 350+ compliance actions inside Patient Protect — every one of them mapped to a specific HIPAA requirement, delivered gradually through your daily workflow. The system knows where you are, what you've done, and what matters most next. You don't have to figure that out.

Your First Week

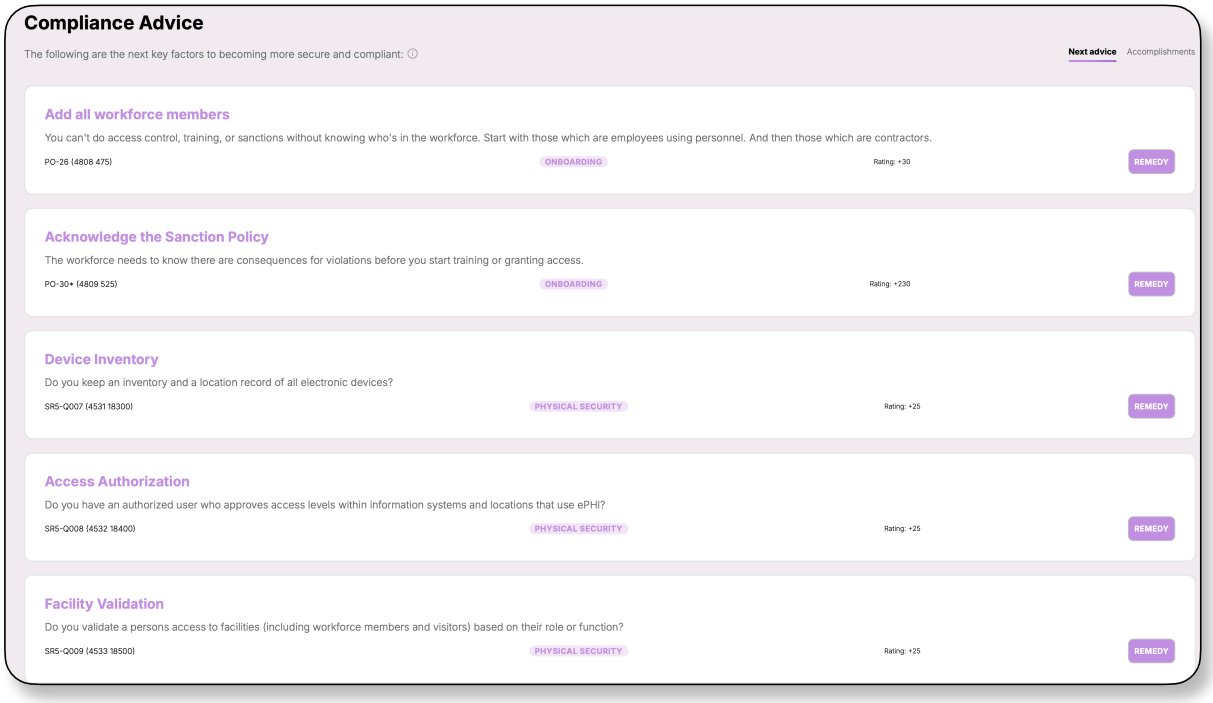
Here's what typical early tasks look like. None of them take more than a few minutes:

- Add your organization details and confirm your email
- Enable multi-factor authentication (MFA)
- Assign HIPAA roles to your team members
- Designate your Security Officer
- Begin your Security Risk Assessment — the first questions, not all 300

STEP 5— DAILY WORKFLOW

COMPLIANCE ADVICE

This is where you go first, every day. Compliance Advice is accessible from the dashboard and from the left navigation menu — and it's the only thing you need to know to make daily progress.



What You'll Find

- Your full task library, organized by priority and HIPAA requirement
- Completed items logged under Accomplishments — a permanent record of what you've done
- Recommended next steps, refreshed as your compliance posture evolves

THE RIGHT EXPECTATION

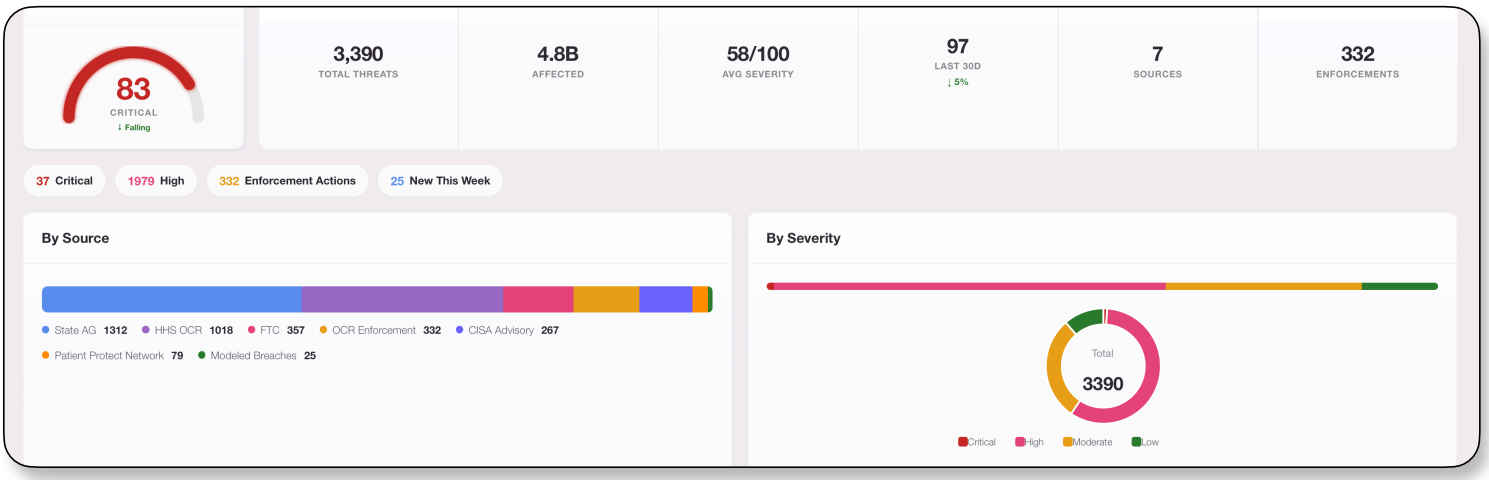
You are not expected to complete everything at once. The system is deliberately designed for daily interaction and incremental progress. A single 5-minute session adds to your record. The practices that build the most defensible compliance histories are the ones that log in consistently — not the ones that sprint once and stop.

STEP 6— PLATFORM FEATURES

Beyond your daily compliance tasks, the platform gives you real-time intelligence about the world your practice operates in. Three areas extend your awareness beyond your own walls.

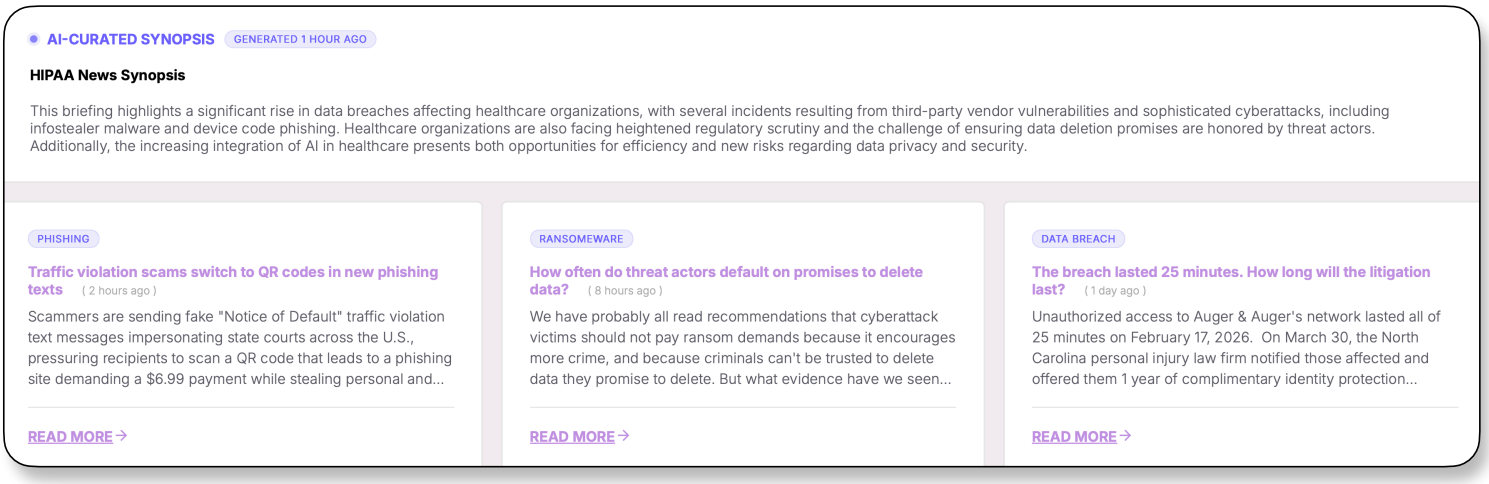
Security Threat Environment

Know what's happening outside your practice before it becomes a problem inside it. This dashboard aggregates HHS breach data, state-level enforcement actions, and Patient Protect network intelligence — so you're never operating in the dark.



HIPAA News Feed

Regulatory guidance shifts. Enforcement priorities change. The news feed delivers curated HIPAA industry updates with AI-generated summaries, alongside internal office announcements that your admin team controls directly. Stay informed without having to search for it.



In Platform Training.

Structured training for HIPAA requirements, platform usage, and security best practices — available to every member of your workforce, directly inside Patient Protect. No external LMS required.

Basic Curriculum

1. HIPAA Fundamentals
2. HIPAA Privacy Rule
3. HIPAA Security Rule
4. HIPAA Breach Notification Rule
5. Real-World Breach Scenarios & Best Practices
6. Risk Assessments
7. Administrative Safeguards
8. Physical Safeguards
9. Technical Safeguards
10. Policies & Procedures
11. Workforce Training
12. Business Associate Agreements (BAAs)
13. Incident Response
14. Auditing & Monitoring
15. Data Backup & Recovery
16. Device & Media Controls
17. Facility Access Controls
18. Continuous Improvement & Ongoing Compliance

New training released monthly for pro users.

STEP 7— SECURE MESSAGING

Standard email is not HIPAA compliant. Patient Protect Secure Messaging is. It looks familiar, works like email, and is safe for protected health information from the first message you send.

Patient Protect Secure Messaging

End-to-End Encrypted

Every message is encrypted in transit and at rest. No exposure points. No compliance gaps.

Safe for ePHI

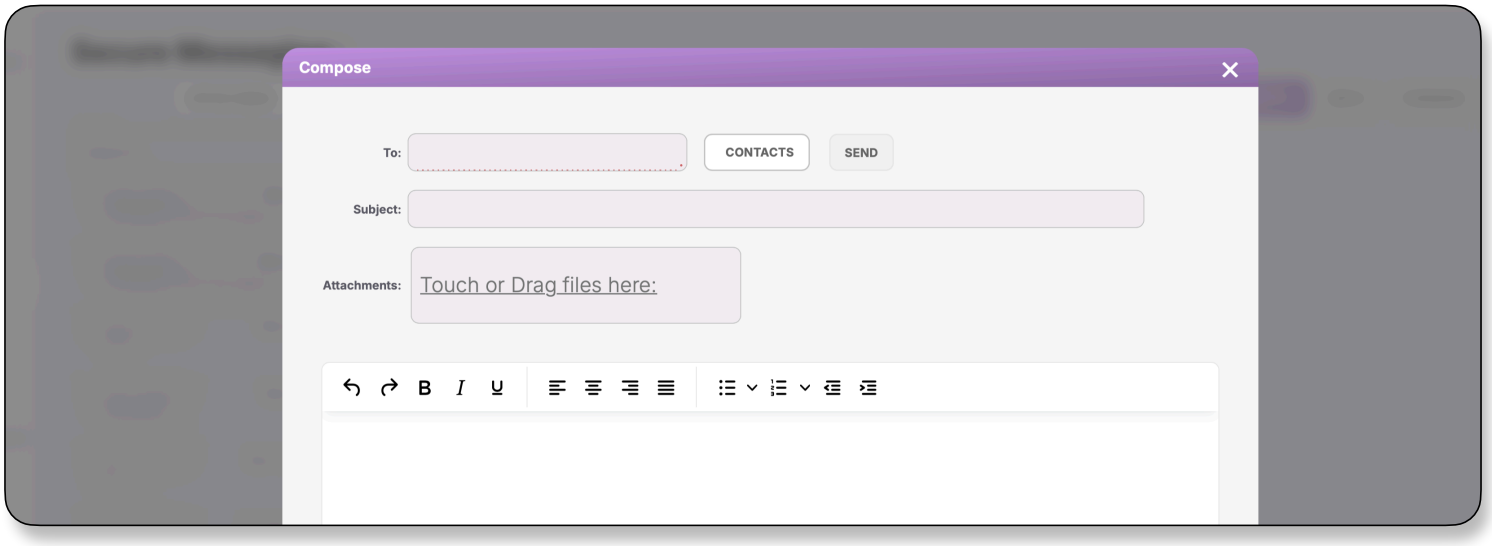
Designed specifically for patient data. Send records, referral notes, and care updates without the risk of standard email.

Internal + External

Use it for staff communication and for direct patient contact. Both are covered under the same secure channel.

Familiar Interface

Compose, reply, attach. It works exactly like email — the security is invisible to the user.



BAA REQUIRED BEFORE USE

Before sending your first secure message, you must sign a Business Associate Agreement within the platform. This is a HIPAA legal requirement, not a formality. The platform will prompt you automatically. It takes under a minute and cannot be bypassed — which is exactly how it should be.

STEP 8— THE COMPLIANCE SYSTEM

Your long-term, auditable compliance record lives here. Six modules. Each one covering a distinct HIPAA requirement. Each one built to be used continuously — not completed once and forgotten.

Information Systems

HIPAA requires a documented technology footprint. Log every device, application, and vendor that interacts with ePHI — with impact-of-loss ratings and network exposure flags. If it touches patient data, it belongs here.

Workforce Management

Manage staff roles, access permissions, and compliance accountability. Document every member of your workforce, assign HIPAA responsibilities, and maintain an incident log. When a regulator asks, you have the record.

Security Risk Assessment

The SRA is the foundation of HIPAA compliance — and one of the most commonly cited deficiencies in enforcement actions. Patient Protect delivers it through 300+ structured questions, surfaced gradually through Compliance Advice. You'll make continuous progress on it from day one.

Risk Analytics

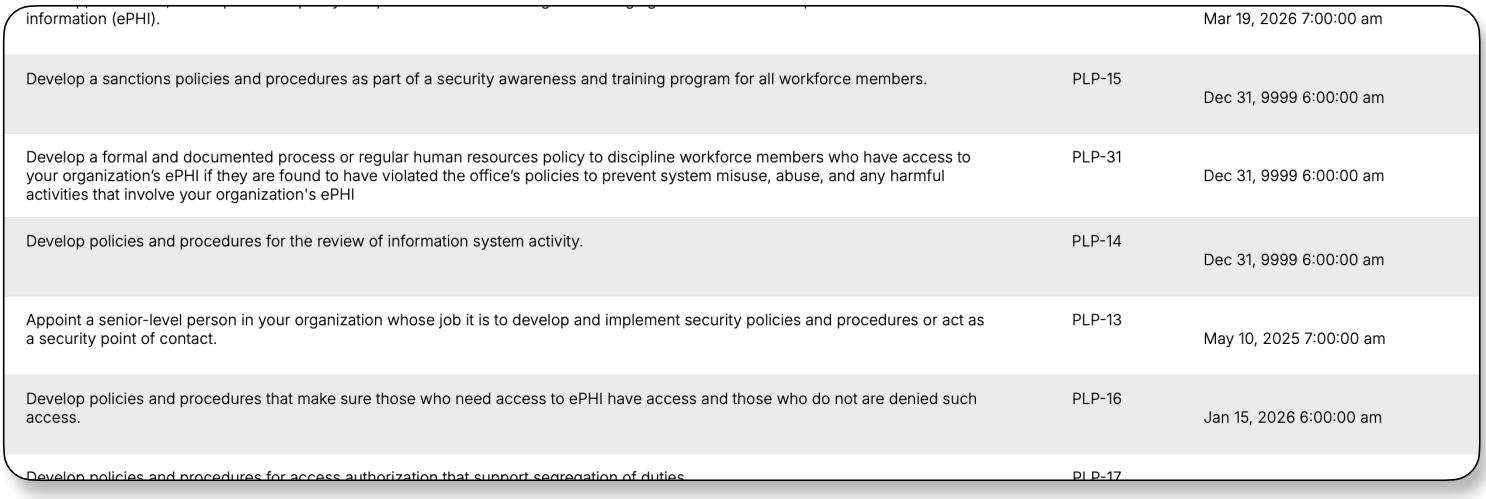
A visual layer over your compliance data. See where you're exposed, what requires immediate attention, and how your risk profile shifts as you take action. The dashboard updates in real time as your answers and activity change.

Policies & Procedures

~45 required HIPAA policies, prebuilt and editable within the platform. Review them, customize them to your practice, and maintain them as requirements evolve. Templates are included for every policy.

Personnel ePHI Audit

A complete, automatically generated log of who accessed patient data, when they accessed it, and what actions were taken. Always current. Always audit-ready. No manual reporting required.



information (ePHI).		Mar 19, 2026 7:00:00 am
Develop a sanctions policies and procedures as part of a security awareness and training program for all workforce members.	PLP-15	Dec 31, 9999 6:00:00 am
Develop a formal and documented process or regular human resources policy to discipline workforce members who have access to your organization's ePHI if they are found to have violated the office's policies to prevent system misuse, abuse, and any harmful activities that involve your organization's ePHI	PLP-31	Dec 31, 9999 6:00:00 am
Develop policies and procedures for the review of information system activity.	PLP-14	Dec 31, 9999 6:00:00 am
Appoint a senior-level person in your organization whose job it is to develop and implement security policies and procedures or act as a security point of contact.	PLP-13	May 10, 2025 7:00:00 am
Develop policies and procedures that make sure those who need access to ePHI have access and those who do not are denied such access.	PLP-16	Jan 15, 2026 6:00:00 am
Develop policies and procedures for access authorization that support segregation of duties	PLP-17	

STEP 9— ADMINISTRATION

Full control over your environment. Subscription management, organization settings, and platform configuration are all centralized in the admin panel.

- Subscription management — upgrade, modify, or cancel at any time
- Organization settings — legal details, branding, contact information
- Platform configuration — user roles, permissions, notification preferences
- Form creation [PRO] — Create and manage any digital form for your office.

STEP 10 — PRO FEATURES

As your organization grows, Patient Protect grows with it. Pro features unlock advanced functionality that goes beyond compliance — extending the platform into operational patient management.

Patient Management

Add patients to the platform, manage their profiles, and invite them directly into the secure environment.

Patient Records

Store, access, and manage patient records securely within the platform — linked to audit trails automatically.

Referrals

Securely refer patients — with their records — to connected offices. Patient consent is built into the workflow.

Extended Workflows

Additional operational tools that activate on demand. No re-onboarding. No disruption to your existing setup.

Form Creation

Create secure, digital intake and operational forms — fully encrypted, automatically stored, and tied to patient records and audit trails. No paper, no gaps, no risk.

Website Contact Ingestion

Capture patient inquiries directly from your website into a secure, compliant environment — eliminating unsecured emails and manual data handling.

AI Expert

Get real-time, context-aware guidance across the platform — helping your team complete compliance tasks correctly, faster, and with confidence.

Extended Training

Core HIPAA training is included. Unlock advanced, role-specific modules with Pro — covering deeper compliance, security practices, and real-world scenarios.

BAA REQUIRED BEFORE USE

Before sending your first secure message, you must sign a Business Associate Agreement within the platform. This is a HIPAA legal requirement, not a formality. The platform will prompt you automatically. It takes under a minute and cannot be bypassed — which is exactly how it should be.

How to Succeed With Patient Protect

A system only works if you use it.

Patient Protect is not something you complete. It's something you operate — and the practices that build the most defensible compliance records do one thing differently from the ones that don't: they show up every day.

That's it. Not a marathon setup. Not a quarterly audit panic. Just consistent, small actions that compound into something regulators can't argue with.

If you:

→ Log in daily

→ Complete your Compliance Advice tasks

→ Engage as your practice evolves

Then compliance becomes:

✓ Measurable — backed by real activity data

✓ Defensible — a documented record regulators respect

✓ Sustainable — built through habit, not force

DO THIS TODAY

→ Complete your Compliance Advice tasks

→ Enable multi-factor authentication (MFA)

→ Designate your Security Officer

Patient Protect

Questions? Reach us at support@patient-protect.com

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